

Generate Inspection Tickets

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The Inspection Ticket generation program within SedonaSchedule creates tickets in bulk based upon the information contained in the System Inspection Setup records that are attached to a Customer's System record. Inspection Tickets and Vendor Inspection Tickets are generated at the same time. If an Inspection Record is setup with a Service Company that is a Service Provider (subcontractor), the ticket will be created as a Vendor Inspection ticket.

Inspection Tickets are typically generated once a month for Inspections due in the next month to allow time to plan for the needed resources. Typically one staff member is responsible for generating all of the Inspection Tickets for the company.

For companies operating under multiple physical Branch locations, you may place this responsibility with each Branch office. When selecting which Inspection Tickets to create, you may filter on a particular Service Company. If you have created unique Service Companies for each Branch office, and the Inspection Records are linked to the appropriate Branch Service Company, then generating Inspection Tickets at the Branch level may be done in separate batches.

Processing and completing Inspection Tickets on a timely basis is essential to staying on schedule with the contractual commitment with your customer. The application will not generate the next Inspection Ticket until the currently open Inspection Ticket has been completed and closed. When an Inspection Ticket is Closed, the software updates the Next Inspection Date on the System Inspection Record setup. The Inspection Ticket generation program looks at the Next Inspection Date on the System Inspection Record to determine which Tickets need to be created.

For example, an inspection is to be performed quarterly beginning in January. Which means you should be inspecting the system within the quarters beginning in January, April, July and October. If the January Inspection Ticket is generated but not yet Closed when you generate your Inspection Tickets for April, the inspection will be skipped. Due diligence on the part of your company is necessary for success when using the automated Inspection Ticket generation process.

Create the Inspection List

Inspection Tickets are created from SedonaSchedule by clicking on the Inspection Creation button within the Arrangement Ribbon Group on the main application ribbon. When Clicking on the Inspection Creation button, a new Ribbon Group is displayed; Inspection Creation.

Generating Inspection Tickets is a two-step process, 1) Creating a List of Inspections due and 2) Creating the Tickets. Within the Inspection Creation Ribbon Group, there are several filter options available which will determine which Inspection Tickets will be created. Each of these filter options is described on the next page.

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Inspection Creation Filter Options

Below is a list of the Filter Options; you may select one or many options depending on which Inspection Tickets you wish to display in the Inspections List. The only required field is the Due As Of date.

- Due As Of - From the Calendar icon, select the date through which you want to see a list of up-coming inspections.
- For System Type - If you want to generate Inspection Tickets for one specific System Type, then make a selection from the drop-down list; otherwise all System Types will be considered in the program selection process. If no selection is made in this field, all System Types will be considered.

- Including Part - If you have created a list of equipment to inspect on your Inspection records setup, you may filter on a particular part number found in the Inspection records setup. For example you may want to inspect all systems where a particular panel is contained in the Inspection Equipment list.
- For Service Co - You may select a single Service Company or all Service Companies will be considered if no selection is made.
- For Route - If your company is using Route Codes, you may select one particular Route or all Routes will be considered if no selection is made.

Once the desired options have been selected, click the Get Inspections button.

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After clicking on the Get Inspections button, a list of all Inspection Records meeting the criteria entered will be listed below the ribbon. You may review the list, then select either all of the records by checking the box at the top of the list in the Select column, or check the box to the left of individual Inspection Records, or check the select all, then de-select any records where you do not want to generate an Inspection Ticket at this time. If any Inspection Records are not checked, the next time you return to this form to generate Inspection Tickets, these records will appear in the list.

Once all the desired Inspections records are checked, click on the Create Tickets button on the ribbon.

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After clicking on the Create Tickets button, the Create Inspection Tickets list will be displayed; this will list all of the Inspection Tickets that will be created - this is a confirmation form. Review the list carefully; if you selected an incorrect Due As Of date, tickets may be created too soon. If you do not want to create the tickets now, click the Cancel button. If you are ready to create the Inspection Tickets, click the Create button.

□ Depending on the number of Inspection Tickets being created, this may take a few minutes - be patient and do not navigate away from this form until the Inspection Records grid is empty; this indicates that the ticket generation process has finished.

Once the ticket creation process has finished, the newly created Inspection Tickets will appear in the Ticket Queue for processing.

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